U.S. General Services Administration

Integrated Technology Services

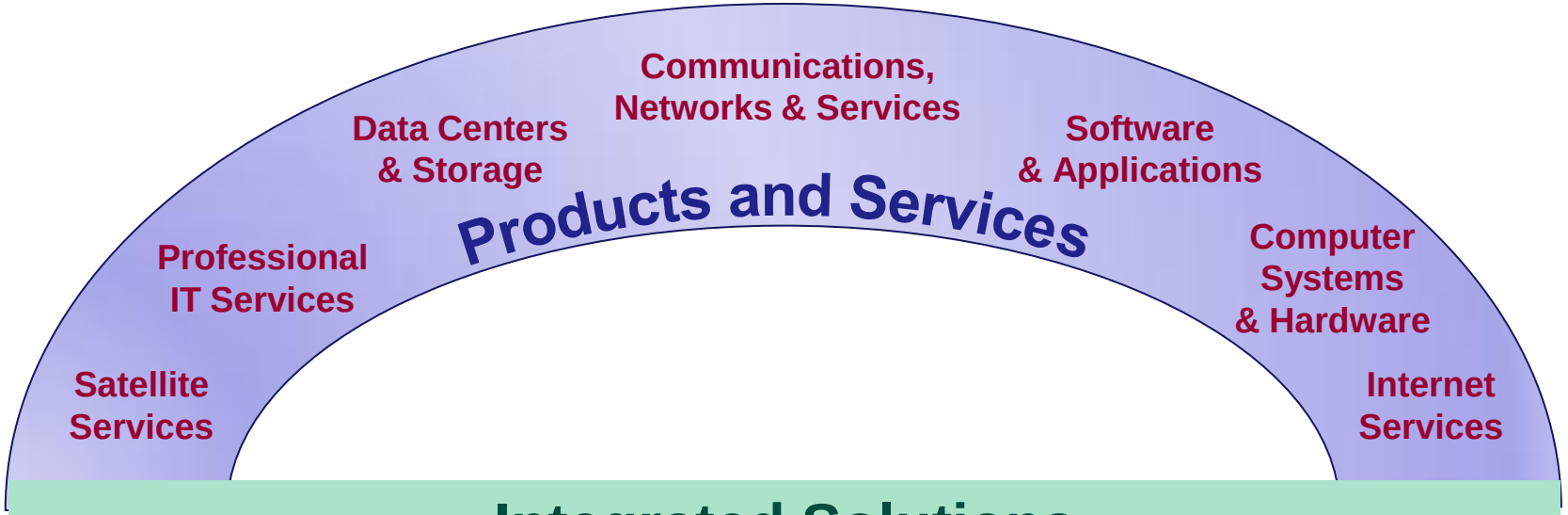
How to Obtain a GSA IT Schedule 70 Contract

Agenda

- ITS Portfolio Delivery Channels
- IT Schedule 70 Overview
- Obtaining the IT Schedule 70 Solicitation
- Preparing the IT Schedule 70 Solicitation
- Evaluation Factors for Contract Award
- Submission of Offer
- Post Award Overview
- Useful Terms & Cast of Characters
- Helpful Websites
- Questions

- The purpose of this training is:
  - to clarify the process and expectations for submitting an offer to the IT Schedule 70 contract.
  - to understand the specific details of the solicitation and to provide opportunity for prospective contractors to seek clarification.
  - to promote better quality offers from contractors who are informed about the program, process and contract.

ITS provides integrated solutions and a full spectrum of IT products and services



Integrated Solutions

Sustainability	Socioeconomic	Wireless & Mobility
Cloud	Data Center Services	Cybersecurity

ITS delivers products and services through four main programs

IT Schedule 70 Overview – Who Are We?

IT Schedule 70 grants agencies direct access to commercial experts who can thoroughly address the needs of the government IT community through Special Item Numbers (SINs).

IT Schedule 70 Offerings	IT Schedule 70 Features

➢ Software Licenses
➢ IT Equipment (Sales or Lease)
➢ IT Training Courses
➢ IT Professional Services
➢ E-Commerce Services
➢ Wireless Services
➢ Satellite Services (COMSATCOM)
➢ Identity and Access Management Products and Services:
  ➢ Digital Certificates
  ➢ HSPD-12 Products and Services
	➢ ID/IQ contracting vehicle to procure IT commercial products & services
	➢ Ordering agency selects products and services based on “best value” to the end-user
	➢ Est. 80% of all contracts held by Small Businesses
	➢ More than 40% of all IT Schedule 70 Sales by Customer Agencies are with Small Business
	➢ Enable agencies to meet socioeconomic goals
	➢ Available to state/local under certain authorities

IT Schedule 70 Overview - Products and Services

Software:

132 32 Term Software Licenses

132 33 Perpetual Software Licenses

Hardware:

132 3 Leasing of Product

132 4 Daily/Short Term Rental

132 8 Purchase of New Equipment

132 9 Purchase of Used/Refurb. Equip.

IT Schedule 70 Overview - Products & Services Cont.

Services:

132 12	Equipment Maintenance
132 34	Maintenance of Software as a Service
132 50	Training Courses
132 51	IT Professional Services
132 52	E-Commerce Services & Subscrip. Services
132 53	Wireless Services
132 54	Commercial Satellite Communications (COMSATCOM) Transponded Capacity
132 55	Commercial Satellite Communications (COMSATCOM) Subscription Services
132-100	Ancillary Supplies and/or Services
132 60A	Electronic Credentials, Not Identity Proofed
132 60B	Electronic Credentials, Identity Proofed
132 60C	Digital Certificates, including ACES
132 60D	E-authentication Hardware Tokens
132 60E	Remote Identity & Access Managed Service Offering
132 60F	Identity & Access Management Professional Services
132 61	Public Key Infrastructure (PKI) Shared Service Provider (SSP) Prog.
132 62	Products and Services for agencies to implement the requirements of HSPD-12, FIP S-201 and associated NIST special publications

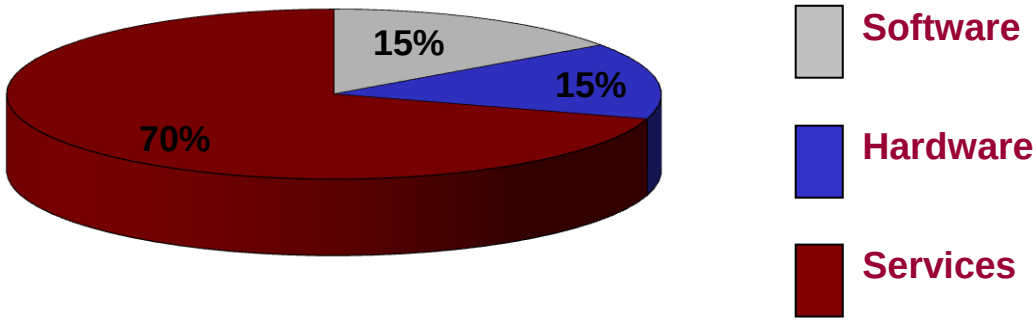
IT Schedule 70 Overview - Sales

FY 10 Sales

- Total Sales:
  - $16.2 Billion
- Software:
  - $2.4 Billion
- Hardware:
  - $2.6 Billion
- Services:
  - $11.1 Billion

State & Local Sales

- $482 Million



IT Schedule 70 Overview - Eligibility

- **Eligibility to Use GSA Sources of Supply:**
  - Executive Agencies and Activities
  - Other Federal Agencies
    - Authorized Cost Reimbursable Government Contractor (FAR Part 51)
  - A Mixed Ownership Government Corporation
  - The District of Columbia
  - Tribal Government, when authorized – 25 USC 450j(k)
  - An Activity or organization authorized by statute or regulation
    - State and Local Government Entity (Certain Programs)
  - Qualified Non-Profit Agency – 40 USC 502(b)

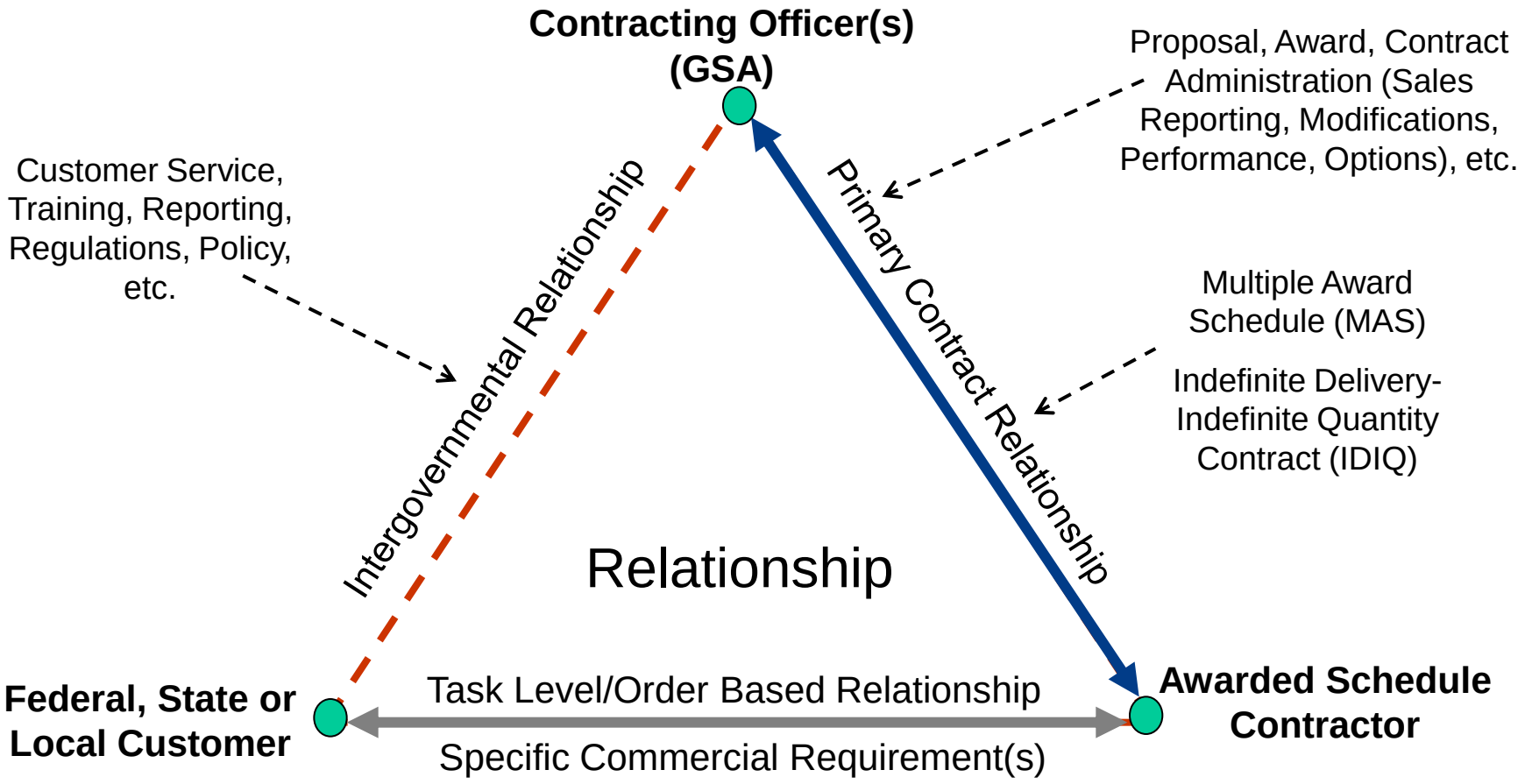
IT Schedule 70 Overview – Important Info.

- Commercial Products, Software and Services Offering only - based on FAR part 12
- Open Solicitation – offers can be submitted at any time
- Indefinite Delivery, Indefinite Quantity (IDIQ)
- “Evergreen Contract”
  - A five-year base period, plus
  - Three five-year option periods
- Economic Price Adjustment (EPA) provisions

IT Schedule 70 Overview – Important Info.

- No Head-to-Head competition for obtaining a MAS contract, negotiated on Contractor's Commercial Practices and Most Favored Customer (MFC) Pricing
- Ordering agency makes selection based on "Best Value"; not limited to lowest price
- Direct Vendor to Customer Relationship
- Mandatory acceptance of credit card for payments equal to or less than the micro-purchase ($3K) threshold

IT Schedule 70 Overview – Important Info.



IT Schedule 70 Overview – State & Local

➢ Related State and Local Purchasing Programs

- **Cooperative Purchasing Program**

– Authorizes State and Local Governments to purchase IT **products and services** (IT Schedule 70) as well as Law Enforcement, Security, Fire and First Response products and services (Schedule 84) at anytime (Also applies to Consolidated Schedule)

- **Disaster Recovery Purchasing Program**

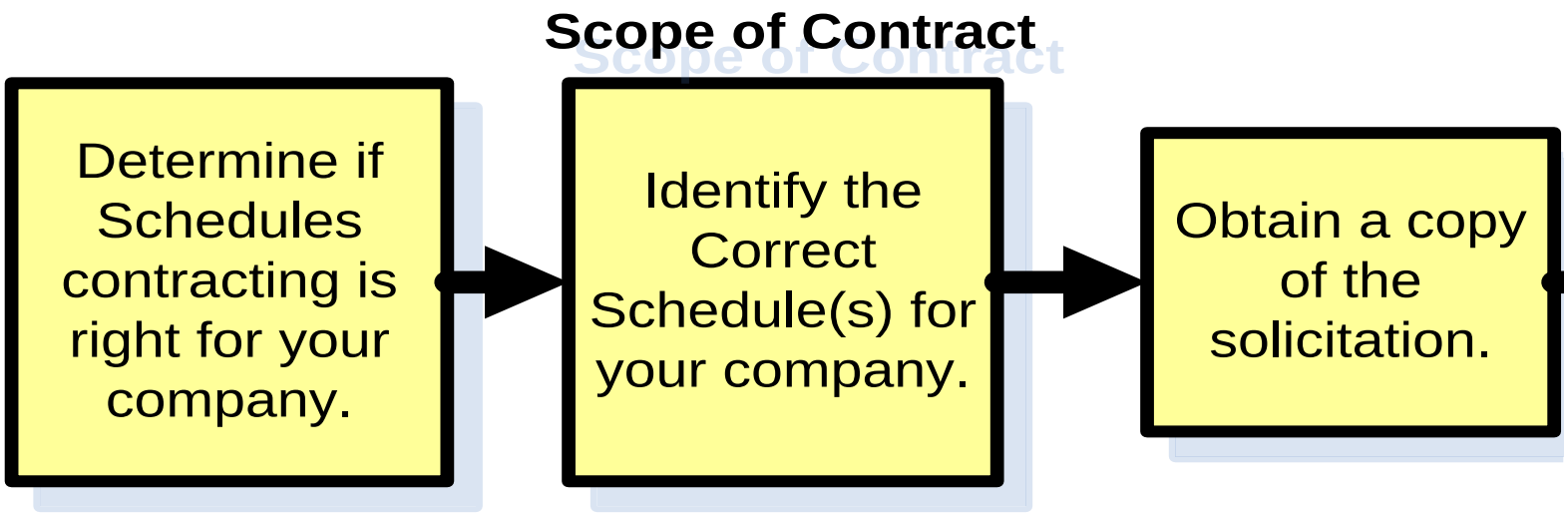
– Authorizes State and Local Governments to purchase **products and services** from all Schedule **only** in the event that a National Disaster or an act of terrorism is declared by the President

- **1122 Counter Drug Purchasing Program**
  – Authorizes State Law Enforcement to purchase certain **products** (Various Schedules) for the purposes of drug interdiction For details and for more information visit: www.gsa.gov/stateandlocal

IT Schedule 70 Overview - ARRA

- American Recovery and Reinvestment Act (ARRA)
  - An effort to jumpstart our economy, create or save millions of jobs, modernize our nation's infrastructure, enhance energy independence, expand educational opportunities, preserve and improve affordable health care, provide tax relief, and protect those in greatest need.

Obtaining the IT Schedule 70 Solicitation



Obtaining the IT Schedule 70 Solicitation Cont.

The official site: FedBizOpps (FBO):

http://www.fbo.gov

Other Sources:

http://www.gsaelibrary.gsa.gov

http://www.eoffer.gsa.gov

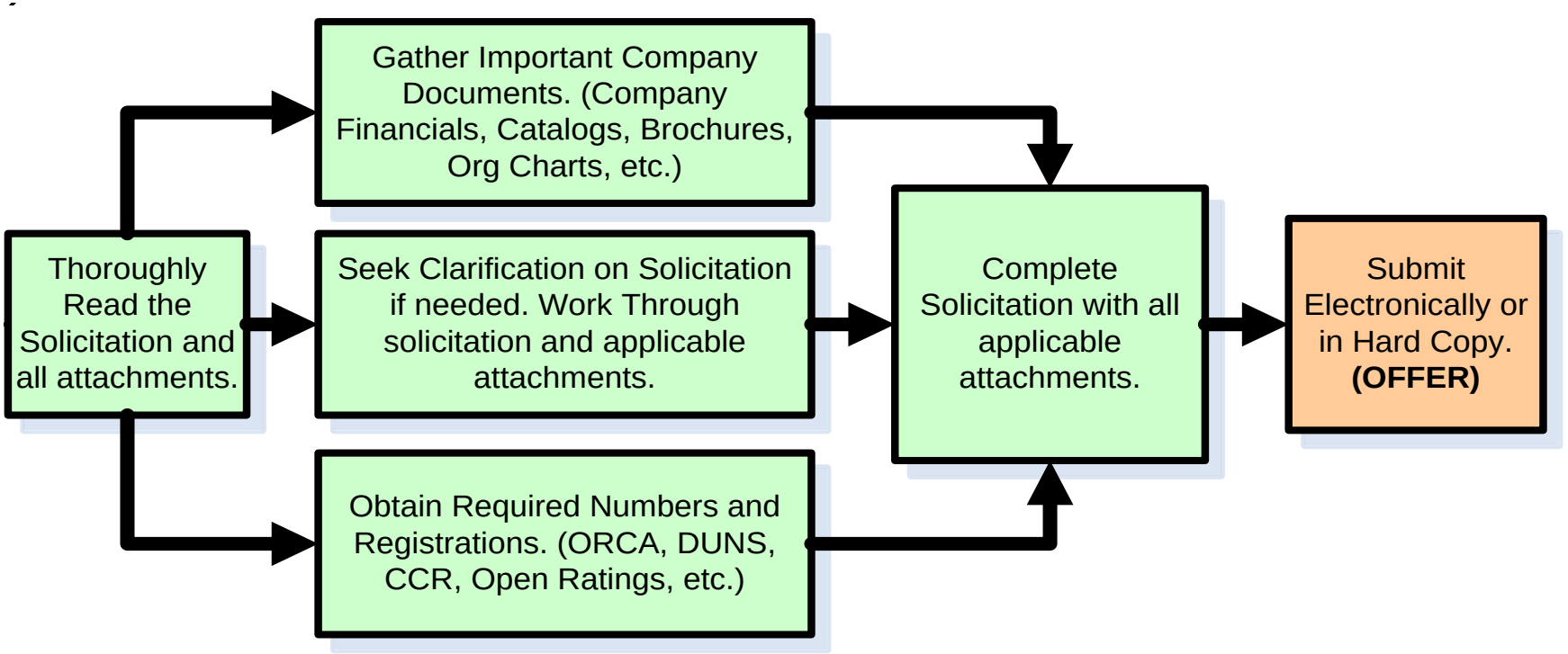
Search by Solicitation Number:

FCIS-JB-980001-B

Obtaining the IT Schedule 70 Solicitation Cont.

01_Read Me First.doc	Microsoft Word Document	4/7/2010 8:34 AM	52,224
02_Solicitation.pdf	Adobe Acrobat Document	4/7/2010 8:34 AM	334,790
03_Vendor Response Document.doc	Microsoft Word Document	4/7/2010 8:34 AM	153,198
04_SF1449.pdf	Adobe Acrobat Document	4/7/2010 8:34 AM	35,150
05_Regulations Incorporated by Reference.pdf	Adobe Acrobat Document	4/7/2010 8:34 AM	199,496
06_Past Performance Evaluation.doc	Microsoft Word Document	4/7/2010 8:34 AM	30,208
07_Small Business Sub Contracting Plan.doc	Microsoft Word Document	4/7/2010 8:35 AM	217,600
08_Proposal Price List Preparation.doc	Microsoft Word Document	4/7/2010 8:35 AM	418,816
09_Commercial Sales Practice Format(CSP-1).doc	Microsoft Word Document	4/7/2010 8:35 AM	51,200
10_Points of Contact.doc	Microsoft Word Document	4/7/2010 8:35 AM	92,160
11_Sample Dealer Reseller Spreadsheet.xls	Microsoft Excel Worksheet	4/7/2010 8:35 AM	23,552
12_MAS Express Program Information.doc	Microsoft Word Document	4/7/2010 8:35 AM	121,344
13_Sample Labor Category Matrix.doc	Microsoft Word Document	4/7/2010 8:35 AM	29,696
14_Letter of Supply Template.doc	Microsoft Word Document	4/7/2010 8:35 AM	41,984

Preparing the IT Schedule 70 Solicitation



Preparing the IT Schedule 70 Solicitation Cont.

- Important Documents to Read and Understand:
  - "Read Me First" Document (Document 1)
  - Read the entire Solicitation (Document 2)
- A **Complete Offer** Includes:
  - Vendor Response Document (Document 3)
  - Signed SF1449 (Document 4)
  - GSA Required Attachments (Various Documents)
  - Offeror's Conditional Attachments (Various Documents)

Preparing the IT Schedule 70 Solicitation Cont. – Vendor Response Document

- Provides overall instructions for preparing your offer
- Establishes the following for your offer:
  - Points of Contact
  - Authorized Negotiators
  - Selected SINs
  - Offeror Responses
    - Contract Clauses
    - Solicitation Provisions
- Provides a list of required and conditional attachments
- The Vendor Response Document is included in the Solicitation Package

Preparing the IT Schedule 70 Solicitation Cont. – GSA Required Attachments

- Commercial Pricelist
- Production Point
- Descriptive Literature
- Offered Pricing
- Proposed EPA Mechanism (including supporting documentation)
- Organization Structure
- Discounting Policies
- Copy of Online Representations & Certifications Application (ORCA) Record
- Copy of Central Contractor Registry (CCR) Record
- Past Performance Evaluation Report (D&B)
- Commercial Sales Practices Format (CSP-1)

Preparing the IT Schedule 70 Solicitation Cont. – Commercial Pricelist

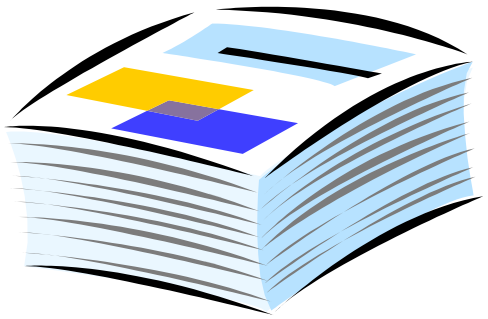
- Offeror must provide a copy of their Commercial Pricelist
  - Catalog
  - Other Pricelist
    - If excerpted from another document, reference source document
- If no Commercial Pricelist is available, (e.g. for Professional Services), provide data to substantiate rates, including:
  - Labor Category
  - Experience Qualifications
  - Functional Responsibility
  - Educational Requirements
  - Contract Number
  - Billing Rate
  - Invoices

Preparing the IT Schedule 70 Solicitation Cont. – Production Point

- List where your offered products are manufactured
- May be included in your Commercial Price List
- Included as well in Letters of Supply
- Not applicable for Services

Preparing the IT Schedule 70 Solicitation Cont. – Descriptive Literature

- Samples of Marketing Materials
  - Promotional Literature
  - Brochures
  - Product Descriptions
  - Services Descriptions
  - Illustrations



Preparing the IT Schedule 70 Solicitation Cont. – Offered Pricing

- Offered Pricing package should include: (Document 08)
  - Pricelist Cover Page and Table of Contents
  - Information for Ordering Activities
  - Terms and Conditions Applicable to Specific SINs under IT Schedule 70
  - Any descriptive information relating to the equipment and/or software offered
  - Products and Services Pricelist - should include, at a minimum, the following:
    - Brand Name, Model and/or Catalog Number (as applicable)
    - Brief description of item
    - Negotiated unit price (NET PRICE) for the product or service
  - Blanket Purchase Agreements (BPAs)
  - Contractor Team Arrangements
  - List of Service and Distribution Points, as applicable
  - List of Participating Dealers, as applicable
  - ***Note: Contractors should indicate if the equipment and/or software is Energy Star compliant***

Preparing the IT Schedule 70 Solicitation Cont. – Proposed EPA Mechanism

- Pricing WITH an Established Commercial Pricelist
  - Clause 552.216-70 applies
  - Adjustments to prices can be based on reissuance of commercial pricelist
  - Limited to 3 increases per 12 month period
  - Cannot exceed 10% per 12 month period
  - Cannot be requested in the first 12 month period
  - Documentation for EPA request is required

Preparing the IT Schedule 70 Solicitation Cont. – Proposed EPA Mechanism

- Pricing WITHOUT an Established Commercial Pricelist
  - Clause I-FSS-969 applies
  - Two Types of EPAs:
    - EPAs based on escalation rates negotiated prior to contract award which results in fixed price for term of contract
    - EPAs based on agreed-upon market indicator prior to award which results in contract modification
  - Limited to 3 increases per 12 month period
  - Cannot be requested in the first 12 month period
  - Proposed EPA Mechanism is required

Preparing the IT Schedule 70 Solicitation Cont. – Organization Structure

- Describe management and the organizational structure of company

- The Offeror shall address the following:
  - History and overview of the organization;
  - Organizational Chart; and
  - Financial Statement/Annual Report

Preparing the IT Schedule 70 Solicitation Cont. – ORCA Registration

- Proof of registration for Online Representations & Certifications Application (ORCA)
  - http://orca.bpn.gov
  - Online paperless collection point for Representations & Certifications
  - Annual completion/updates required

Preparing the IT Schedule 70 Solicitation Cont. – Central Contractor Registration

- Proof of registration for Central Contractor Registration (CCR)
  - http://www.ccr.gov
  - CCR collects, validates, stores, and disseminates data in support of agency acquisition missions

Preparing the IT Schedule 70 Solicitation Cont. – Past Performance Evaluation Report (D&B)

- Request a Past Performance Evaluation report from D&B Open Ratings, Inc. (**Document 06**)
  - http://www.ppereports.com (The Contractor is responsible for the cost of the report)
- Report is sent directly to Requestor/Offeror
- Request copy to be sent to GSA via email at:
  - it.center@gsa.gov
- To ensure GSA receives a report, send a copy with the offer

Preparing the IT Schedule 70 Solicitation Cont. - Commercial Sales Practices Format (CSP-1)

- The CSP-1 template is included in the Solicitation Package (Document 09)
  - Sales to the general public – 12-month period
  - Projected Sales under this contract
  - Discounting Policies
  - Matrix of Customers and Discounts
  - Written Discounting Policies provided as narrative portion of the Commercial Sales Practices Format (CSP-1)

Preparing the IT Schedule 70 Solicitation Cont. – Offeror's Conditional Attachments

- Conditional Attachments may be REQUIRED depending on the size of your company and/or the SINs offered by your company.

Attachment	Who Must Submit?
Subcontracting Plan	Large Businesses with expected sales >$650K
Letters of Supply	Resellers
Dealer/Reseller Spreadsheet	Resellers
Professional Services Experience	Professional Service Providers
Labor Category Descriptions	Professional Service Providers
Authorized Dealer(s) Information	Resellers
Training Course Descriptions	Professional Service Providers – Classroom Training
Compensation Plan for Professional Employees	Professional Service Providers with expected sales >$650K
Solicitation Exceptions	Any Offeror Taking Exception with any of the Applicable Terms and Conditions, FAR Clauses, or GSAR Clauses
Pricing Support	Any Offeror Wishing to Provide Additional Pricing Information in Support of the Pricing Proposal

Preparing the IT Schedule 70 Solicitation Cont. – Small Business Subcontracting Plan

- Large Business with projected sales >$650K
- Outlines your company's:
  - Small Business Subcontracting Goals
  - Reporting Requirements
  - Recordkeeping Requirements
- The Subcontracting Model Plan is provided as an Attachment in the Solicitation Package (Document 07)

Preparing the IT Schedule 70 Solicitation Cont. – Dealer/Reseller Spreadsheet

- Required by all Offerors who are dealers/ resellers offering other manufacturer's products
- Demonstrate accurate and complete pricing information on manufacturer, dealer/reseller and GSA proposal
- The Template is provided as an attachment in the Solicitation Package (Document 25)

Preparing the IT Schedule 70 Solicitation Cont. – Authorized Dealer(s) Information

- Required by all Offerors Providing Products
- List of all Authorized Dealers for products offered
- You Must Keep this Up-to-Date

Preparing the IT Schedule 70 Solicitation Cont. – Letter of Supply

- Required by all Offerors who are dealers/ resellers offering other manufacturer's products
- Demonstrate source of supply
- Submit letters of supply on company's letterhead
- Signed by corporate company official
- The Letter of Supply Template is included in the Solicitation Package (Document 12)

Preparing the IT Schedule 70 Solicitation Cont. – Training Course Descriptions for SIN 132-50

- Required by all Offerors Providing IT Classroom Training as a Service
- A formal catalog or a written descriptions of class offerings
- Length of course
- Location (Contractor or Customer site)

Preparing the IT Schedule 70 Solicitation Cont. – Labor Category Descriptions

- Required by all Offerors Providing IT Professional Services SIN132-51 and/or Identity and Access Management Professional Services SIN132-60F
- Labor Category Descriptions
  - Title of labor category
  - Functional responsibility performed
  - Qualifications
  - Education required

Preparing the IT Schedule 70 Solicitation Cont. – Compensation Plan for Professional Employees

- Required by all Offerors Providing IT Professional Services per FAR 52.222-46 Evaluation of Compensation for Professional Employees SIN132-51 and/or Identity and Access Management Professional Services SIN132-60F
- Reflects a sound management approach and understanding of the contract requirements
- Your plan will be considered in terms of:
  - its impact upon recruiting and retention;
  - its realism; and
  - its consistency with a total plan for compensation
- May submit general compensation practices from Offeror's Employee Handbook

Preparing the IT Schedule 70 Solicitation Cont. – Past Performance

- Required by all Offerors Providing IT Professional Services SIN132-51 and/or Identity and Access Management Professional Services SIN132-60F
- Provide the following information:
  - Project/Contract Name
  - Project Description
  - Dollar Amount of Contract
  - Project Duration
  - Point of Contact and Telephone Number
- The Sample Labor Category Matrix included in the Solicitation Package (Document 17)

Preparing the IT Schedule 70 Solicitation Cont. – Solicitation Exceptions/Waivers/Deviations

- May be submitted by any Offeror taking exception with one or more of the following portions of the Solicitation:
  - FAR Clauses
  - GSAR Clauses
  - Any other Terms and Conditions

- Provide written documentation of the rationale behind your exception

Evaluation Factors for Contract Award

SCP-FSS-003 (c) (1) GENERAL PROPOSAL SUBMISSION INSTUCTIONS

- Factor 1 – Financial Responsibility Determination
- Factor 2 – Corporate Experience
- Factor 3 – Past Performance
- Factor 4 – Project Experience for SINs 132-51 and 132-60F (IT and IAM Professional Services only)
- Factor 5 – Project Experience for SINs 132-54 and 132-55
- Factor 6 – Information Assurance Minimum Security Controls for SINs 132-54 and 132-55
- Factor 7 – Price Proposal

All technical evaluation factors will be reviewed, evaluated and rated acceptable or unacceptable based on the criteria listed above for each factor.
However, Offers determined unacceptable for all proposed SIN(s) will be rejected.

Technical Evaluation Factors for Contract Award Cont.

- **Factor 1. Financial Responsibility Determination** - Provide the most current, completed, audited (if available) 2 years of consolidated financial statements, specifically balance sheets and income statements, or information that demonstrates the company's financial capacity.

- **Factor 2. Corporate Experience – Provide a 2 page (maximum) n**arrative description of corporate experience for all proposed SINs offered. For each SIN offered provide the type of products and/or IT professional services procured by either Government or Commercial entity for a **minimum of 2 years**. Unique to SINs 132-60A, B &C, the successful completion of Levels 1, 2, 3 or 4 Credential Assessment is required.

- **Factor 3. Past Performance –** Vendors are responsible for ordering and submitting a Past Performance Evaluation from Open Ratings, Inc. (ORI)

Technical Evaluation Factors for Contract Award Cont.

- **Factor 4. Project Experience for SIN 132-51 & 132-60F only**
  IT & Identity Access Management (IAM) Professional Services - Provide a description of the offeror's experience. Describe three completed or on-going project(s) similar in size and complexity to the effort contemplated and in sufficient detail, for the Government to perform an evaluation. For SIN 132-60F, two of the three projects described must be previous Federal Government application deployment projects for public-facing IT systems. Each completed example shall have been completed **within the last two years.**

- **Factor 5. Project Experience for SINs 132-54 and 132-55 -** Provide a description of the Offeror's experience delivering COMSATCOM services as described in CI-FSS-055, C*ommercial Satellite Communication (COMSATCOM) Services*.

Technical Evaluation Factors for Contract Award Cont.

- **Factor 6. Information Assurance Minimum Security Controls for SINs 132-54 and 132-55 -** Complete the Information Assurance Checklist found on the GSA SATCOM Services Program Management Office website (http://www.gsa.gov/satserv). The Government will evaluate the Information Assurance Checklist submitted as part of Offeror's proposal to determine whether the Offeror understands the minimum security controls, and has processes, personnel, and infrastructure that currently complies or demonstrates a reasonable approach to becoming compliant with all the minimum security controls for at least a low-impact information system or MAC III system.

- **Factor 7. Price Proposal –** In accordance with GSAM 538.270, the goal of the Government is to obtain the offeror's best price given to the Most Favored Customer (MFC). Therefore, GSA is to required to obtain pricing that is equal to or better than the MFC pricing with the same or similar terms & conditions.

Submission of Offer - Electronic (eOffer)

- eOffers
  - Web-based application
  - Electronically prepare and submit an MAS contract proposal virtually
  - For Information: www.eoffer.gsa.gov
  - For Technical Assistance with the eOffer system call: 1-866-472-9114

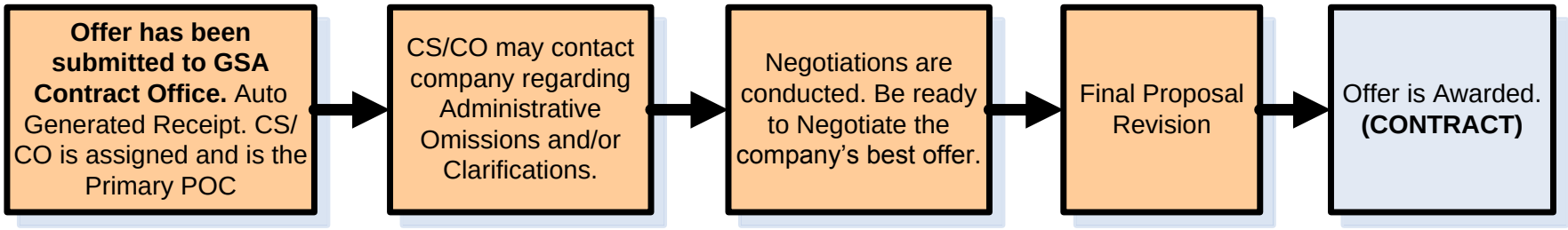
Submission of Offer - Physical

- Paper Documents or electronic Media (i.e. saved on CD)
- Must be submitted in 3 Volumes:
  - Volume I: Contract Data
  - Volume II: Technical Proposal
  - Volume III: Price Proposal
- The entire offer must be submitted in duplicate.
- Mail to:

GSA/FAS
Center for IT Schedule Programs
Solicitation No. FCIS-JB-980001-B
Attn: Central Intake Desk (CID)
2200 Crystal Drive
CP #4, Room 606
Arlington, VA 22202

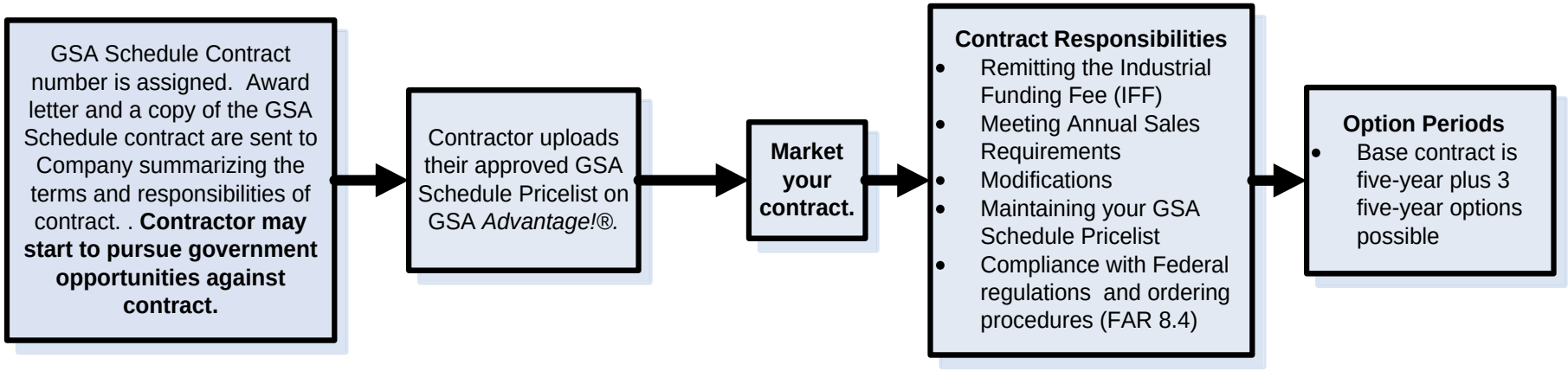
Steps to Award - Post Submission

Post Submission (Offer)



Post Award Overview

Post Award and Contract Management (Contract)



Useful Terms & Cast of Characters

- FAS — Federal Acquisition Service
- ITS — Integrated Technology Service
- FSS — Federal Supply Schedules
- MAS — Multiple Award Schedules
- IDIQ — Indefinite Delivery Indefinite Quantity
- NAICS — North American Industrial Classification System
- SIN — Special Item Number
- FSG/FSC — Federal Supply Group/Federal Supply Code
- ORCA — Online Representations and Certification Application
- DUNS — Data Universal Numbering System
- CCR — Central Contractor Registration
- FBO — Federal Business Opportunities (FedBizOpps)
- PCO — Procuring Contracting Officer
- ACO — Administrative Contracting Officer
- IOA — Industrial Operations Analyst

Helpful Websites

Planning and Preparation:	
Office of IT Schedule Programs:	http://www.gsa.gov/schedule70
Central Contractor Registry (CCR):	http://www.ccr.gov
D&B Open Ratings, Inc., Past Performance Evaluation report:	http://www.ppereports.com
Dun & Bradstreet (D&B):	http://www.dnb.com/us
Electronic Subcontracting Reporting System (eSRS):	http://www.esrs.gov
Getting on Schedule For Vendors information:	http://www.gsa.gov/gettingonschedule
GSA eOffer	http://eoffer.gsa.gov
GSA Schedules Program:	http://www.gsa.gov/schedules
GSA State and Local Programs:	http://www.gsa.gov/stateandlocal
Online Representations and Certification Application (ORCA):	http://orca.bpn.gov

Helpful Websites

Planning and Preparation (Continued):	
Other Training at GSA:	http://www.gsa.gov/events
Schedule 70 Overview:	http://www.gsa.gov/schedule70
Schedule Sales Query (SSQ):	http://ssq.gsa.gov
Veterans' Employment & Training Service (VETS)-100:	https://www.dol.gov/vets
View/Download the Solicitation:	http://www.fedbizopps.gov or http://www.gsa.gov/schedule70

GSA Electronic Tools:	
GSA *Advantage!®:*	http://www.gsaadvantage.gov
GSA eBuy:	http://www.ebuy.gsa.gov
GSA eLibrary:	http://www.gsaelibrary.gsa.gov

Helpful Websites

Regulations and Guidance:	
GSA Vendor Support Center	http://www.gsa.gov/vendorsupportcenter
72A Quarterly Reporting System:	https://72a.gsa.gov
Acquisition Central:	http://www.acquisition.gov
Excluded Parties List System:	http://www.epls.gov
Federal Acquisition Regulation (FAR):	http://www.acquisition.gov/far
GSA Acquisition Manual (GSAM)/GSA Acquisition Regulation (GSAR):	http://www.acquisition.gov/far
GSA SmartPay Program:	http://www.gsa.gov/smartpay
North American Industry Classification System (NACIS) Industry Codes:	http://www.census.gov/eos/www/naics/
U.S. Small Business Administration:	http://www.sba.gov
Wage Determinations OnLine.gov:	http://www.wdol.gov

Need Assistance?

Office of IT Schedule Programs

Customer Service

Phone: 877-446-IT70 (4870)

Email: IT.Center@gsa.gov

or

Vendor Support Center

Phone: 877-495-4849

Email: http://www.gsa.gov/vsc

Mon- Fri 8:00am to 5:00pm EST

Thank you for your interest and participation!

Please remember:

- Read, Read, Read the solicitation before completing it

For more information contact:

IT.Center@gsa.gov

ITS can help make all of your IT acquisitions **faster**, **cheaper** and **easier**

Questions?